



Modernized ACE Portal

Trade Account Types

December 2023



U.S. Customs and
Border Protection





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TOPIC 1: WHAT'S NEW?

RELEASED – DECEMBER 2023

New functionality in the Modernized ACE Portal includes the ability to perform blanket declaration tasks in importer and organizational broker account types:

1. **Importers** with an ACE portal account can complete actions to search, print, add and cancel blanket declarations.
2. **Organizational Brokers** can complete blanket declaration search, print, add, and cancel actions on behalf of importers without an ACE portal account.

The following blanket declarations are supported in the Modernized ACE Portal:

- Affidavit of Manufacture
- Importer Certifying Statement
- Non-Reimbursement Blanket Statement (Antidumping/Countervailing Duty (AD/CVD))
- North American Free Trade Agreement (NAFTA) Certificate of Origin

For detailed information and steps to complete blanket declaration actions in the Modernized ACE Portal, select this link to access the training guide: [Blanket Declarations Quick Reference Guide \(QRG\)](#).

The **ACE Training and Reference Guides** webpage (<https://www.cbp.gov/trade/ace/training-and-reference-guides>) provides convenient access to all **Modernized ACE Portal** training materials.





TOPIC 2: NAVIGATE THE MODERNIZED ACE PORTAL

INTRODUCTION

After creating your Modernized ACE Portal account, the Modernized ACE Portal home page displays. The home page consists of:

1. **Home, Accounts, Account Search, and References** tabs
 - **Home** – Returns you to the home page.
 - **Accounts** – Contains a list of all types of accounts.
 - **Account Search** – Displays all search results and filter capability.
 - **References** – Displays links to other ACE applications.
 - Use the **CEE Directory** link in the **References** tab to access and search Centers of Excellence and Expertise (CEE) contacts.
 - Change the display order of the tiles by selecting a tile and using your mouse to drag and drop it at the desired location.
 - Additional system links will be added on the **References** tab page as modernized portal functionality development continues.
2. **Global Search (Enter Account Name, Type, ACE ID...)**
 - Search for accounts and records by keyword, name, or identifier.
3. **(Your Name)** drop-down menu:
 - **Contact Support** – Contact CBP with technical issues concerning the Modernized ACE Portal.
 - **Log Out** – Log out of the Modernized ACE Portal.
4. **Global Search (Enter Account Name, Type, ACE ID...)**
 - Search for accounts and records by keyword, name, or identifier.
5. **Recently Viewed Accounts**
 - The last ten accounts viewed.
 - Select an account hyperlink to display the account details.



IMPORTANT: As a Trade user, you only are able to see your Top Accounts and the associated subaccounts. If you view one account ten times, it will only display once in the **Recently Viewed Accounts** list.





For questions about the new ACE portal, please [click here](#). To return to Legacy ACE, please [click here](#).

ace

2 Enter Account Name, Type, ACE ID... 3

Home Accounts Account Search References 1

Welcome to ACE

v1.9.6

4 Enter Account Name, Type, ACE ID...

5 Recently Viewed Accounts 4 Records

ACE ID	Name	Account Type	Identification Type	Identification Number
1 0000211214	ManishaTOPacct	Top	ACE ID	0000211214
2 0000251573	Team Night	Top	ACE ID	0000251573
3 0000251576	Night filers	Filer	Filer Code	N05
4 0000252204	AUTO4820 E2E0406402	Importer	IR #	03-111009215

6. **CBP News, CSMS Feed, and ACE Support** - Contains general CBP news, hyperlinks to Cargo System Messaging Service (CSMS) messages, and ACE support resources.

6

News

ACE Portal Modernization Now Underway

Changes Coming to Trade User Responses to CBP Forms 28, 29 and 4647

CSMS Feed

CSMS #50993800 - Correction – Action Identifier error on ACE portal upload requests

CSMS #50993301 - ACE Production Invasive Maintenance, Sat. Feb 12, 2022 @ 10:00pm to 04:00am ET Sun. Feb 13, 2022

CSMS #50992263 - Action Identifier error on ACE portal upload requests

CSMS #50988022 - Delays in ACE Truck E-Manifest Transmissions 02/08/22 - 02/09/22

CSMS #50997547 - CBP Guidance to Trade for

ACE Support

ACE Portal Overview

ACE Support Resources

ACE Training Resources

ACE Homepage

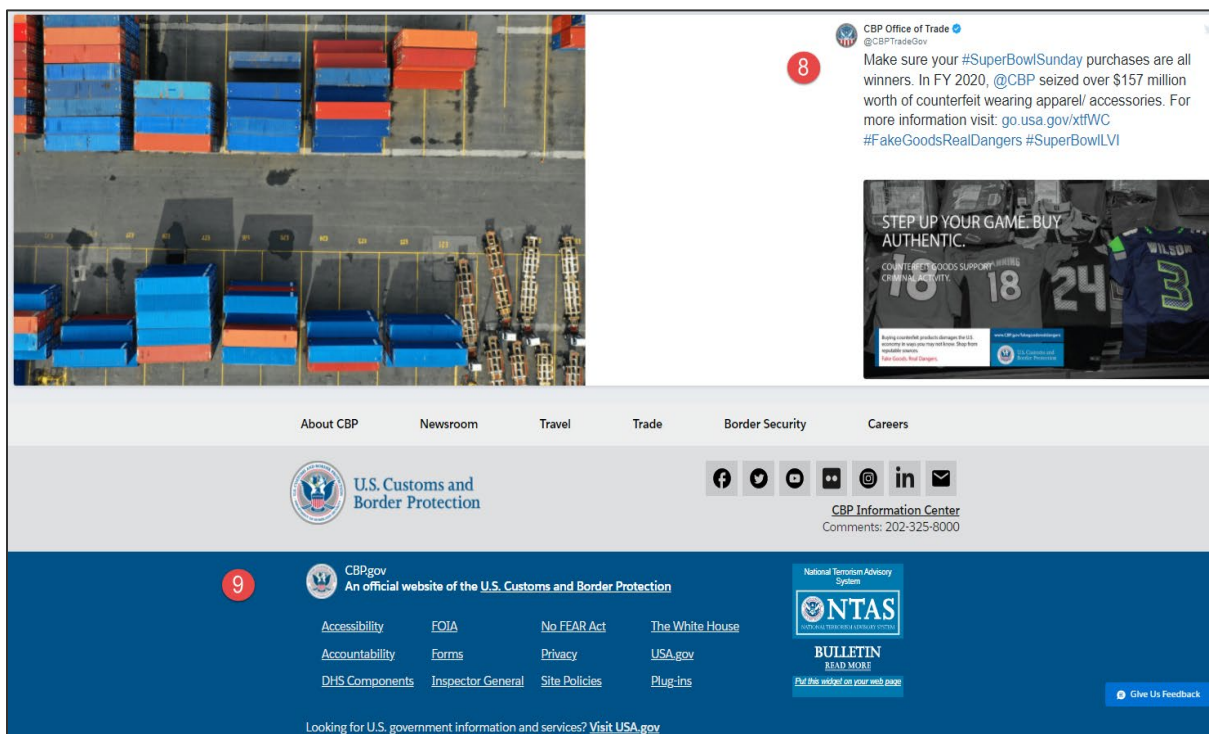
7. **ACE Development and Deployment Schedule** - Contains information associated with the Modernized ACE Portal deployments, and upcoming ACE Portal events.

This schedule reflects ACE enhancements that have been prioritized, funded, and are now under development. This is a notional schedule, and it is subject to modifications.

7 ACE Development and Deployment Schedule

8. **CBP Twitter Feed** – Contains links to CBP news.
9. **Footer** – Contains links to additional information not associated with the Modernized ACE Portal.





SEARCH FOR AN ACCOUNT USING THE GLOBAL SEARCH FIELD

1. In the **Global Search** field:
 - a. Type the *account name*.
 - b. Select the **Search** icon 🔍.



TIP: You can also select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If the account is in the **Recently Viewed Accounts** list, select the account hyperlink.

2. In the search results that display, in the **Account Name** column, select an account name hyperlink.

All				
Showing 1 / 1 Results				
Account Type	Account Name	Identification Type	Identification Number	ACE ID
1 Top	Universal Containers	ACE ID	0000206232	0000206232

The account details page displays. All subaccounts associated with the Top Account display in the **Account Navigation** pane.





Account Navigation

- ▼ Universal Containers
ACE ID: 0000206232
- ▼ Carrier
Universal Carriers Inc.
Carrier Code: MSEP
- ▼ Exporter
Universal Exporter
EIN: 23-3344555
- ▼ Facility Operator
 - ▼ Container Facilities LLC
Taxpayer ID: 008-77-1111
 - ▼ Facilities
Facilities Unlimited
ACE ID: 0000211066
 - ▼ Container Operators
Taxpayer ID: 009-08-2014
 - ▼ Facilities
Universal's Facility
ACE ID: 0000221657

3. Select any subaccount to display the subaccount's details.

Account Name
Universal Carriers Inc.

Record Type Name	ACE ID	SCAC	Mode of Transport	Status
Carrier	0000212093	MSEP	Truck	Active

Details | Contacts | Addresses | Bonds | Drivers/Crew | Consignees | Conveyances | Equipment | IR #'s | Shippers

▼ **Carrier Information**

Carrier Name Universal Carriers Inc.	Carrier Automated Yes
Taxpayer ID Type	Taxpayer ID 33-2211222
Employer ID Number (EIN)	Mode of Transport Truck
ACE ID 0000212093	SCAC MSEP
SCAC Issued By CBP	Cargo Release Notification
DOT Number 12345333	U.S. DOT Census# 12345333
Status Active	Mode Designation PRVCAR
Date Created 10/6/2021	Date of Last Update 12/2/2021
	Input Format
	Census Code 34C
	Time Created 4:09:36
	Last Modified Date 3:38:41
	IMC #

> Other Company Name

> Organization Information

> Insurance

> Program Participation

> C-TPAT Information

> FAST Information

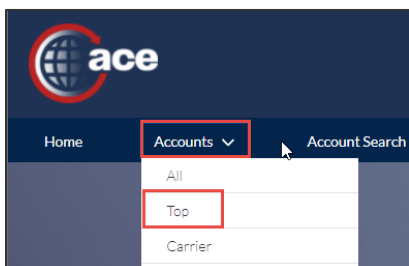
[Give Us Feedback](#)





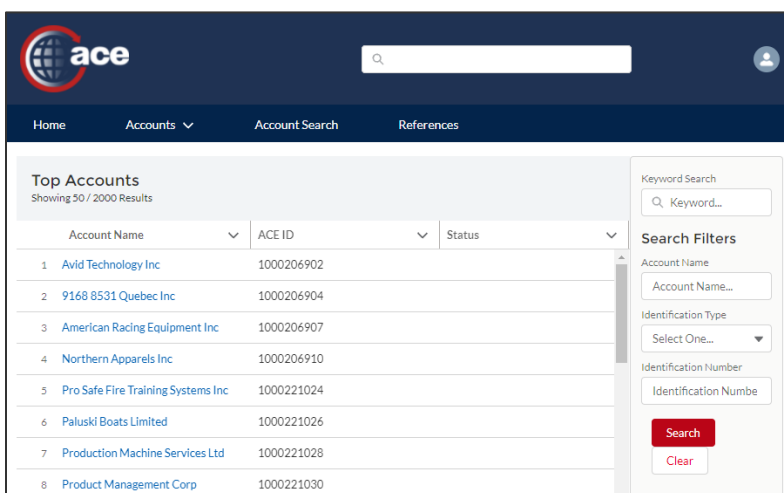
SEARCH USING THE ACCOUNTS TAB IN THE HOME PAGE

1. In the **Accounts** tab, select an account type from the drop-down menu.

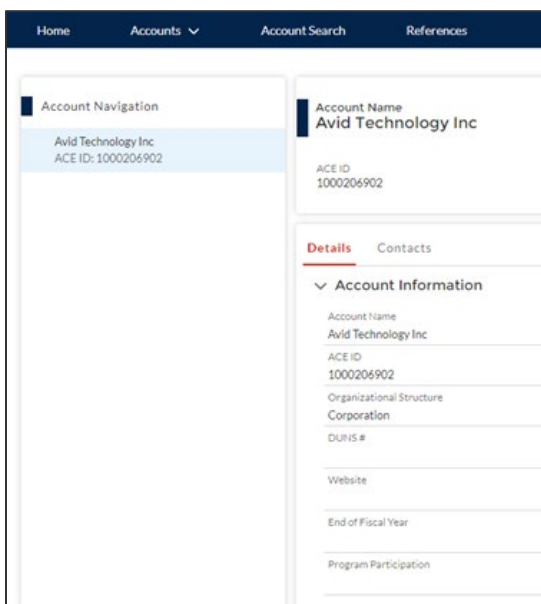


All your accounts for the account type selected display.

2. In the accounts page, in the **Account Name** column, select an account hyperlink.



The account details page and the **Details** tab display.





TOPIC 3: CREATE A NEW ACCOUNT

INTRODUCTION

Trade Top Account Owners with authorized permissions can create Exporter, Protest Filer, and Vessel Agency accounts in the Modernized ACE Portal. Trade Account Owners can provide Proxy Account Owners with permission to add accounts (changes to user permissions are done in the Legacy Portal). You can also add the information from the Form 5106 to register the Importer of Record number.

The general steps to create an account are:

1. Select a top account to associate to the account you are creating.
2. Select which account type to create.
3. Add the account information.
4. Add the address information.
5. Add the contact information.
6. Review the added information.
7. Save the account.



IMPORTANT: For certain account types, additional information is added.

CREATE A NEW ACCOUNT

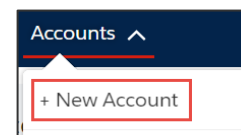


IMPORTANT: The steps below show the general create process (select the top account and account type; add account, address, and contact information; then review and save) for all account types. Some account types require additional information beyond the general steps. Note that some steps only apply to the specific account type that is indicated at the beginning of the step.

When <Account Type> is indicated in the steps, proceed based on the specific type of account that you are adding.

SELECT A TOP ACCOUNT AND AN ACCOUNT TYPE

1. Select the **Accounts** tab drop-down menu and select the **+ New Account** option.



The **Select a Top Account** pane displays.

Select a Top Account

*Top Account Search

Search Top Accounts Q

2. Select the ***Top Account Search** text field, and type a *partial or full top account name or ACE ID*.

A drop-down menu of matching top accounts displays.





- In the ***Top Account Search** drop-down menu, select the top account for the new account.
The **Create a New Account** pane displays.

Create a New Account

*** Please Select an Account Type**

☐ Exporter
 ☐ Protest Filer

☐ Importer
 ☐ Vessel Agency

✕ Cancel
✓ Confirm

- Select the radio button for the type of account to create.



IMPORTANT: Selecting the **Importer Account Type** equates to completing the Form 5106 to register the Importer of Record (IR) number. This does not create an importer account and associate it to the top account.

- Select the **✓ Confirm** button.

ADD ACCOUNT INFORMATION

- In the **Create a New <Account Type>: <Account Type> Information** pane, in the **<Account Type> Information** section, complete the appropriate account information fields.



NOTE: Fields with an asterisk are required.
For EIN Taxpayer ID, use format NN-NNNNNNN.

Create a New Exporter: Exporter Information

✓

▼ Exporter Information

*** Account Name**

*** Taxpayer ID Type**

Select an Option ▼

*** Taxpayer ID**

▼ Organization Information

*** Organizational Structure**

Select an Option ▼

DUNS #

▼ Other Company Names

AKA

DBA

DIV

< Back
✕ Cancel
Next >
Give Us Feedback





7. If applicable, in the **Organization Information** section:
 - a. Select the ***Organizational Structure** drop-down menu and select an option.
 - b. For an **Exporter** account, if applicable, in the **DUNS #** field, type a *DUNS number* in NN-NNN-NNNN format.
8. If applicable, in the **Other Company Names** section, in the **AKA**, **DBA**, and **DIV** fields, type *other company name(s)* as appropriate.
9. For a **Vessel Agency** account, in the **Account Status** section, select the ***Status** drop-down menu and select a status option.
10. Select the **Next >** button.



NOTE: Select the **< Back** button to return to the prior pane.

Select the **Cancel** button to cancel adding a new account and select the **OK** button in the confirmation dialog box.

Confirm

Are you sure you want to exit? Your progress will not be saved.

Cancel
OK

ADD ADDRESS INFORMATION

11. In the **Create a New <Account Type>: Address Information** pane, in the **Street (Physical) Address Information** section, complete the appropriate physical street address fields.

Create a New Exporter: Address Information

✓
✓
○
●
●

▼ Street (Physical) Address Information

* Address Type

Street (Physical) Address ▼

C/O

* Country

United States ▼

* Street

Additional Address Line 1

Additional Address Line 2

* City

* State

Select an Option ▼

* Postal Code

County

▼ Contact Information

Phone

Phone Ext

Fax

Fax Ext

Email

Website

< Back
✕ Cancel
Next >





NOTE: The ***Address Type** field and address section title may vary depending upon the account type. The ***Address Type** field is prefilled by default and not editable. The ***Country** field may also be prefilled by default and not editable, depending upon the account type.

12. In the **Contact Information** section, complete the appropriate fields for a contact at the address.



NOTE: The **Website** field must begin with https://.

13. For an **Importer account**, in the **Mailing Address Information** and **Contact Information** sections, complete the appropriate mailing address and contact fields.



NOTE: Select the **Use as Mailing Address** checkbox in the upper right to duplicate the **Physical Address** and **Contact** fields into the **Mailing Address** and **Contact** fields.

14. Select the **Next >** button.

The **Validate Address** dialog box displays.

Validate Address

User's Input Address	Validated Address
<p>Street: 2522 S Brand Blvd City: Glendale State/Province: CA Country: US Postal Code: 91204</p>	<p>Street: 2522 S BRAND BLVD City: GLENDALE State/Province: CA Country: US Postal Code: 91204</p>
<input checked="" type="checkbox"/> Use Validated Address?	
<div style="background-color: #d32f2f; color: white; padding: 5px 15px; border-radius: 3px; display: inline-block;"> Confirm </div>	



NOTE: The **Validate Address** dialog box may display again if multiple addresses were entered.

15. Select the **Confirm** button to confirm the validated address(es).

For an **Importer account**, review and complete the **Additional Information**, **Related Business Information**, **Banking & Company Information**, and **Certification Information** panes as appropriate (steps 16-22):

16. In the **Create a New Importer: Additional Information** pane, in the **Additional Information** section, complete the appropriate fields.





Create a New Importer: Additional Information

Progress bar: 1st step complete, 2nd step active, 3rd step pending, 4th step pending, 5th step pending, 6th step pending, 7th step pending.

Additional Information

* Email Address

Company Website

* Account Phone

Phone Ext

Account Fax

< Back Cancel Next >

17. Select the **Next >** button.

18. To add related business information, in the **Create a New Importer: Related Business Information** pane, in the **Add Related Businesses** section, select the **New Related Business** button.

19. If applicable, in the expanded **Add Related Businesses** section:

Create a New Importer: Related Business Information

Progress bar: 1st step complete, 2nd step complete, 3rd step complete, 4th step active, 5th step pending, 6th step pending, 7th step pending.

Add Related Businesses New Related Business

Remove

* Related Business Status
Current

* Name of Business Entity

* TIN/EIN/SSN/CBP Assigned #

< Back Cancel Next >

a. Complete the appropriate fields.

b. Select the **Next >** button.



NOTE: Select the **Remove** button to exit without saving the related business information.





20. If applicable, in the **Create a New Importer: Banking & Company Information** pane:

Create a New Importer: Banking & Company Information

✓

✓

✓

○

▼ Company Information

Business Description

Year Established

NAICS Code

DUNS #

XX-XXX-XXXX

Self Filer Code

Search Self Filer Code

Articles of Incorporation (Country)

Select an Option

Articles of Incorporation (State)

Select an Option

Articles of Incorporation (Reference #)

FIRMS Code

SCAC

a. In the **Company Information** section, complete the appropriate fields.

▼ Banking Information

Primary Bank Name

Bank Routing Number

Bank Country

Select an Option

Bank State

Select an Option

Bank City

< Back

✕ Cancel

Next >

b. In the **Banking Information** section, complete the appropriate fields.

c. Select the **Next >** button.





21. In the **Create a New Importer: Certification Information** pane, select the **Expand** icon > to the left of the **Certification Information** title to expand the section.
22. In the expanded **Certification Information** section:

Create a New Importer: Certification Information

> Certification Information

A filer who transmits data or information through any electronic means to CBP certifies the data or information transmitted is true, correct, and provided in good faith. The filer certifies that if there is intentionally false data, or commits deception or fraud in the 5106 submission, that the filer will be fined or imprisoned (18 U.S.C. § 1001).

* Certify Individual's Full Name

* Certify Individual's Title

Certify Individual's Phone

Broker Name

Broker Phone

* ☐ Electronic Signature

< Back

✕ Cancel

Next >

- a. Complete the appropriate fields.
- b. Select the **Electronic Signature** checkbox.
- c. Select the **Next** > button.

ADD CONTACT INFORMATION (EXCEPT IMPORTER)

23. In the **Create a New <Account Type>: Contact Information** pane, in the **Employee Information** section:





Create a New Exporter: Contact Information

Employee Information

Type

Primary Point of Contact

First Name

Last Name

Title

Select an Option

Middle Name

Address Information

Address Type

Contact Relationship Address

Country

United States

Additional Address Line 1

City

Postal Code

C/O

Street

PO Box

Additional Address Line 2

State

Select an Option

County

Contact Information

Phone

Fax

Email

Phone Ext

Fax Ext

Website

Back

Cancel

Next >

Give Us Feedback



NOTE: The ***Type** field is prefilled with the required **Primary Point of Contact** by default.

- In the ***First Name** and ***Last Name** fields, type the *first and last name* of the primary point of contact.
- If applicable, in the **Title** drop-down menu, select a title option.
- If applicable, in the **Middle Name** field, type a *middle name*.

24. In the **Address Information** section, complete the appropriate address fields for the primary point of contact.



NOTE: The ***Address Type** and ***Country** fields are prefilled by default and may not be editable.

25. In the **Contact Information** section, complete the appropriate contact fields for the primary point of contact.

26. Select the **Next >** button.





The **Validate Contact Relationship Address** dialog box displays.

Validate Contact Relationship Address

User's Input Address

Street: 234 Elk Ave
City: Glendale
State/Province: CA
Country: US
Postal Code: 91204

Validated Address

Street: 234 W ELK AVE
City: GLENDALE
State/Province: CA
Country: US
Postal Code: 91204-1719

☒ Use Validated Address?

Confirm

27. Select the **Confirm** button to confirm the validated address.

REVIEW ADDED INFORMATION

28. In the **Create a New <Account Type>: Review** pane, review the added account information, scrolling down to review all fields.

Create a New Exporter: Review

Selected Top Account

Best Bonnets Top

Exporter Information

Account Name

Hats Off Exporter

Taxpayer ID Type

Employer ID Number (EIN)

Taxpayer ID

25-9876525

Organization

Organizational Structure

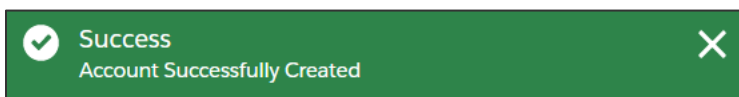
Individual

DUNS #

XX-XXX-XXXX

29. Select the **Save** button to save the added account.

The **Account Successfully Created** message displays.



The associated top account and new account display in the left **Account Navigation** pane and the **Account Name** and account information display on the right.



IMPORTANT: The importer account does not display to the left; the add process registers the IR number. To add the importer account to your top account, follow the instructions on [cbp.gov](https://www.cbp.gov) **Adding Sub-Account Types or Account Identifiers to an Existing ACE Portal Account** on the [Managing an ACE Secure Data Portal Account](#) page.



Account Navigation

Best Bonnets Top
ACE ID: 1004325598

Exporter

Hats Off Exporter
EIN: 25-9876525

Account Name
Hats Off Exporter

Record Type Name
Exporter

ACE ID
1004325610

EIN
25-9876525

Details

Contacts

Addresses

Exporter Information

Exporter Name
Hats Off Exporter

ACE ID
1004325610

EIN
25-9876525

> Other Company Names

> Organization Information

> Account Status



NOTE: Use the **< Back** button if needed to navigate to previous sections to update information. Then, select the **Next >** button to return to the **Review** pane and select the **Save** button.

Select the **Cancel** button to cancel adding the account.





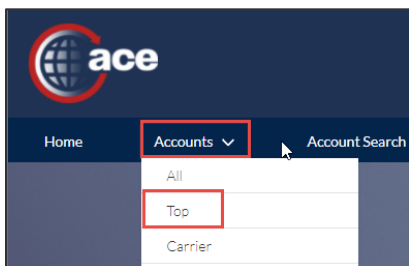
TOPIC 4: LOCATE AND EDIT A TOP ACCOUNT

INTRODUCTION

You can locate and edit information in your Top Accounts in the Modernized ACE Portal.

LOCATE AND EDIT DETAILS FOR A TOP ACCOUNT

1. In the **Accounts** tab, select **Top** from the drop-down menu.

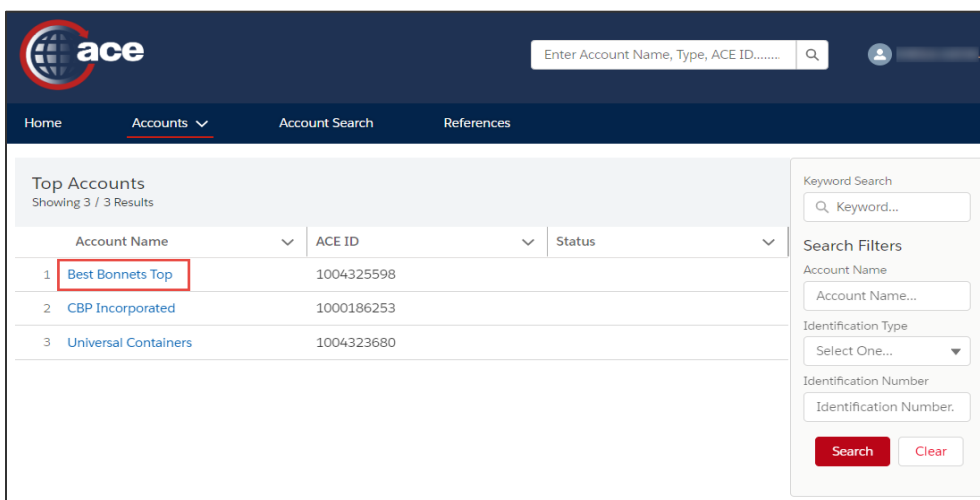


Your top accounts display.



TIP: If you know the name of the Top Account, type it in the **Global Search** field. If you recently viewed the Top Account, select it from the **Recently Viewed Accounts** pane.

2. In the **Top Accounts** page, in the **Account Name** column, select a top account name hyperlink.



The **Account Details** page displays.



NOTE: Use the **Search Filters** pane to filter the list of Top Accounts. In the **Keyword Search** field, search by typing an account whole or partial name and select the **Search** button. A wild card character is not required. All records with the keyword in the name will display regardless of the type of account. In addition to a keyword search, you can search by ID. When searching by ID, you can search by partial identification number.



- In the **Details** tab, select the **Edit** icon in any field.

- In the edit pane:

- Select a field.
- Edit the information.
- Repeat for other fields, as necessary.
- Select the **Save** button.



NOTE: Grayed out fields are not editable.



IMPORTANT: Any edits you make in the Modernized ACE Portal are visible in the Legacy ACE Portal.





LOCATE AND EDIT ADDRESS INFORMATION FOR A CONTACT OF A TOP ACCOUNT

1. Locate a Top Account.



TIP: You can select the **Accounts** drop-down menu and select Top Account, then select the account in the list that displays. If you recently viewed the top account, select it in the **Recently Viewed Accounts** list.

2. In the **Account Name** section, select the **Contacts** tab.

The **Related Contacts** display.

Type	Last Name	First Name	Phone	Email
Primary Point of Contact	Wilson	James	562-321-4567	
Primary Point of Contact	Ferguson	Catherine	828-858-0932	

3. In the **Type** column, select the contact hyperlink.

4. In the pane that displays:

Address Type	Street	City	State	Postal Code
Contact Relationship ...	2798 E DE SOTO ST	LONG BEACH	CA	90814-2336

- a. Select the **Addresses** tab.
- b. In the **Address Type** column, select the **Address Type** hyperlink.





5. In the pane that displays:


a. Select an **Edit** icon .


Contact Type
Primary Point of Contact


Contact First Name	Contact Last Name	Contact Title
James	Wilson	


▼ Address Information



Address Type
Contact Relationship Address



Country
United States 



C/O 

Street
2798 E DE SOTO ST 







PO Box 


Additional Address Line 1  Additional Address Line 2 

City
LONG BEACH  County 

State
California  Postal Code
90814-2336 

▼ Contact Information

Phone 562-321-4567 	Phone Ext 
Fax 	Fax Ext 
Email 	Website 



b. In the appropriate field(s), complete the information.

▼ Contact Information

* Phone


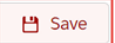
Phone Ext


Fax

Fax Ext

Email

Website





NOTE: You must enter fields with an asterisk that are blank.

c. Select the **Save** button.





TOPIC 5: LOCATE AND EDIT SUBACCOUNT INFORMATION

INTRODUCTION

Trade Top Account Owners with authorized permissions can view and edit subaccount information. In the Legacy ACE Portal, Trade Account Owners can provide Proxy Account Owners with permission to view and edit subaccounts.

Accounts may include additional tabs of supporting data to view and edit based on permissions associated with an account type. For example, permissions associated with a facility account type allow users to view, add, and edit document folders and documents, employees, and officials.

Reference the [Ocean Conveyances Trade QRG](#) for details to process ocean conveyances in a carrier account.

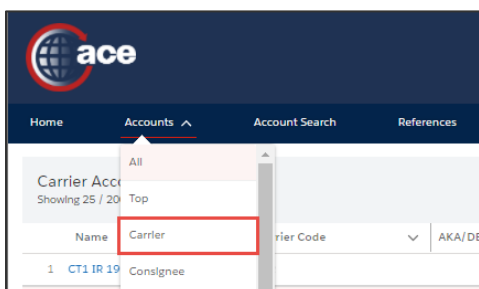
Reference the [Blanket Declarations QRG](#) for details to search for, add, print, and cancel declarations in an importer account or an organizational broker account on behalf of an importer without an account.

VIEW AND EDIT SUBACCOUNT INFORMATION



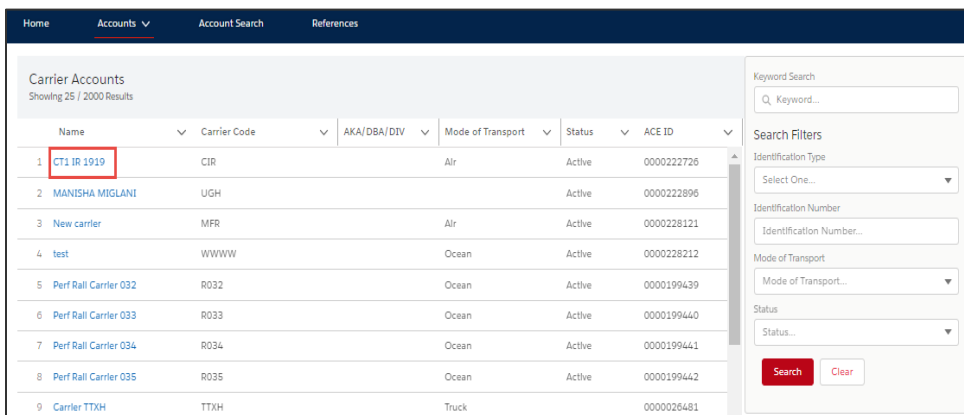
IMPORTANT: The steps below show the general process to view, edit, and add supporting data for subaccounts. Some account types require additional steps for additional subtabs beyond the general steps. Note that some steps only apply to the specific account type that is indicated at the beginning of the step.

1. In the **Accounts** tab, select a record type from the drop-down menu.



TIP: If you know the name of the record, type it in the **Global Search** field. Use the **All** drop-down menu at the top left to indicate the type of account to narrow the list.

2. In the accounts page that displays, in the **Name** column, select an account name hyperlink.



The **Account Details** page displays.





NOTE: Use the **Search Filters** pane to filter the list of accounts. In the **Keyword Search** field, type whole or partial words and select the **Search** button to search for accounts. A wild card character is not required. All records with the keyword in the name display regardless of the type of account. In addition to a keyword search, you can search by ID. When searching by ID, you can search by partial identification number.

3. In the **Account Name** pane, select a tab.

Account Name
UNIVERSAL CONTAINERS TRANSPORT INC

Record Type Name Carrier	ACE ID 1000230721	SCAC UCTA	Mode of Transport Truck	Status Active
-----------------------------	----------------------	--------------	----------------------------	------------------

Details | Contacts | Addresses | Bonds | Drivers/Crew | Consignees | Conveyances

✓ Carrier Information

Carrier Name	UNIVERSAL CONTAINERS TRANSPORT INC	ACE ID	1000230721
Taxpayer ID Type		Taxpayer ID	
Employer ID Number (EIN)	23-3232032		
Mode of Transport	Truck	SCAC	UCTA
U.S. Dot Number	1797438		

> Other Company Names

> Organization Information

> Insurance



NOTE: The tabs available depend on the type of subaccount selected. You can expand and collapse sections to show/hide account information.

4. If applicable, select a hyperlink in the first column to display the detailed information.

Details | Contacts | **Addresses** | Bonds | Drivers/Crew | Consignees

Related Addresses
2 Records

	Address Type	Street	City
1	NMFTA Address	400 Duncan Ave	Jersey City
2	Street (Physical) Address	10050 VANDERBILT CIR	ROCKVILLE

5. Select the **Edit** icon

Details | Contacts | Addresses | Bonds | Drivers/Crew | Consignees

✓ Carrier Information

Carrier Name	UNIVERSAL CONTAINERS TRANSPORT INC	ACE ID	1000230721
Taxpayer ID Type		Taxpayer ID	
Employer ID Number (EIN)	23-3232032		
Mode of Transport	Truck	SCAC	UCTA
U.S. Dot Number	1797438		





6. In the edit pane:

Details Contacts Addresses Bonds Drivers/Crew Consignees Conveyances

▼ Carrier Information

Carrier Name	ACE ID
UNIVERSAL CONTAINERS TRANSPORT INC	1000230721
Taxpayer ID Type	Taxpayer ID
Employer ID Number (EIN)	23-3232032
Mode of Transport	SCAC
Truck	UCTA
U.S. Dot Number	
1797438	

a. Select a field.

b. Edit the information.



NOTE: Grayed out fields are not editable.

c. Edit other fields, as necessary.

d. Select the **Save** button.

In a **Carrier** account, for users with permission to view bond information and process ocean conveyances (steps 7-8):

7. Select the **Bonds** tab to view the bonds.

Account Name
ACE OCEAN TEST CARRIER

Manifest Trade In-Bond

Record Type Name	ACE ID	SCAC	Mode of Transport	Status
Carrier	1000103679	XXXA	Ocean	Active

Details Contacts Addresses **Bonds** Drivers/Crew Consignees Conveyances Former Conveyances More

Related Bonds
3 Records

Bond #	Importer #	Importer Name	Status	Activity Code
1 9911Y4670	111-11-1111	PETE	Active	2



NOTE: The bond information is provided by the eBond application.

a. Select the **Bond #** hyperlink.

The bond details and subtabs of additional information display.





Details

▼ Bond Information

Bond #

9911Y4670

Principal Number

111-11-1111

Bond Status

Active

Principal Name

PETE

Execution Date

2011-11-07

Effective Date

2011-11-07

Termination Date

Activity Code

2 - CUSTODIAN OF BONDED MERCHANDISE

Amount \$

100000.00

Sufficiency Status

Sufficient

Insufficiency Date

Principal/User

Surety

Rider

Sufficiency

In-Bond Authorization

Principal/User

1 Records

Importer #	Importer Name	Type	Start Date	End Date
111-11-1111	PETE	Principal	11/7/2011	

- Select a subtab to display additional information.
- Select the **< Back** button to return to the carrier account information.

Home

Accounts ▼

Account Search

References

< Back

Account Navigation

Details

▼ Bond Information

- Select the **Conveyances** tab to process ocean conveyances.

Account Name

ACE OCEAN TEST CARRIER

Manifest Trade In-Bond

Record Type Name

Carrier

ACE ID

1000103679

SCAC

XXXA

Mode of Transport

Ocean

Status

Active

Details

Contacts

Addresses

Bonds

Drivers/Crew

Consignees

Conveyances

Former Conveyances

More

Related Ocean Conveyances

13 Records - Sorted By Vessel Code

Vessel

Search

Bulk Upload

Download All

Add Ocean Conveyance

	Vessel Code ↑	Vessel Name	Flag of Registry	Former Vessel ...	Effective Start Date	Effective End Date
1	11111111	TEST STEP 1	United States	Ocean Gate	04/21/2011	

Reference the [Ocean Conveyances Trade QRG](#) for information and steps to complete ocean conveyances actions.





For **Organizational Broker** account users with permissions to perform blanket declaration tasks, reference the [Blanket Declarations QRG](#) for steps to complete blanket declaration search, add, print, and cancel actions.

In an **Importer** account, for users with permission to view importer details, notify parties, drawback privileges, and bonds; and search, add, print, and cancel declarations (steps 9-14):

9. Select the **Details** tab to view the importer information.

Details | Contacts | Addresses | Related Businesses | Notify Parties | Drawback | Bonds | Declarations | Change History

▼ Importer Information

Account Name
Tip Top Hats Off

ACE ID
1004327337

IR #
233002-00009

Entries Per Year

Request CBP Assigned IR #
Yes

ID Utilized

☐ Importer of Record ☐ Consignee / Ultimate Consignee
☐ Drawback Claimant ☐ Refund / Bills ☐ Other

Full Legal Importer Name

Taxpayer ID Type
CBP Assigned Number

Center ID
CEE004 - Apparel, Footwear and Textiles

Organizational Structure
Individual

CBP Assigned # IR Justification

☒ I have a SSN, but wish to use a CBP-Assigned Number on all my entry documents
☐ I have no SSN ☐ I have no IRS #
☐ I have not applied for IRS # or SSN ☐ I am not a U.S. Resident

Program Code

☐ Authorized Economic Operator
☐ Customs-Trade Partnership Against Terrorism
☐ Importer Self-Assessment ☐ Partners in Protection

10. In the **Details** tab, select the **Expand** icon > to expand sections for additional details.

> Other Company Names

> Additional Information

> Company Details

> Banking Details

> Partnership Details

> Administration Control Information

> Certified Details

> Mode of Communication

11. Select the **Notify Parties** tab to view the notify parties.

Account Name
Tip Top Hats Off

Record Type Name
Importer

ACE ID
1004327337

IR #
233002-00009

Status
Active

Details | Contacts | Addresses | Related Businesses | **Notify Parties** | Drawback | Bonds | Declarations | Change History

Related Notified Parties

1 Records

	ACE Id	Name	Type	IR #	Process Date	Create By
1	1004325798	Ryan Importer	23	202-22-2222	7/10/2023	





12. Select the **Drawback** tab to view the drawback privileges.

Account Name
Tip Top Hats Off

Record Type Name: Importer ACE ID: 1004327337 IR #: 233002-00009 Status: Active

Details Contacts Addresses Related Businesses Notify Parties **Drawback** Bonds Declarations Change History

Drawback Privileges
1 Records

Provision	Privilege	Application Date	Approval Date	Revoke Date	Port of Appro...	Notes/Comm...
1	51 - TFTEA 1313(a)	Accelerated Paym...	7/3/2023		1001 - NEW YORK...	



NOTE: Select the **Provision** hyperlink to display the drawback privilege information in the **Drawback Detail** pane.

13. Select the **Bonds** tab to view the bonds.

Account Name
Tip Top Hats Off

Record Type Name: Importer ACE ID: 1004327337 IR #: 233002-00009 Status: Active

Details Contacts Addresses Related Businesses Notify Parties Drawback **Bonds** Change History More

Related Bonds
0 Records

Bond #	Importer #	Importer Name	Status	Activity Code
1	9911Y4670	111-11-1111	PETE	Active



NOTE: The bond information is provided by the eBond application.

a. Select the **Bond #** hyperlink.

The bond details and subtabs of additional information display.





Details

▼ Bond Information

Bond #
9911Y4670

Principal Number
111-11-1111

Bond Status
Active

Principal Name
PETE

Execution Date
2011-11-07

Effective Date
2011-11-07

Termination Date

Activity Code
2 - CUSTODIAN OF BONDED MERCHANDISE

Amount \$
100000.00

Sufficiency Status
Sufficient

Insufficiency Date

Principal/User Surety Rider Sufficiency In-Bond Authorization

Principal/User
1 Records

Importer #	Importer Name	Type	Start Date	End Date
111-11-1111	PETE	Principal	11/7/2011	

- b. Select a subtab to display additional information.
- c. Select the **< Back** button to return to the importer account information.

Home Accounts ▼ Account Search References

< Back

Account Navigation

Details

▼ Bond Information

14. Select the **Declarations** tab to search for, add, print, and cancel declarations.

Reference the [Blanket Declarations QRG](#) for information and steps to complete blanket declaration actions.

In a **Surety** account, for users with permissions to view bonds; and view and edit power of attorney information (steps 15-18):

15. Select the **Bonds** tab to view the bonds.

Account Name
CBP ASD Surety

Record Type Name ACE ID Surety Code Status
Surety 1004293148 CBP EIN Pending

Details Contacts Addresses **Bonds** CSPOA's

Related Bonds
0 Records

Bond #	Importer #	Importer Name	Status	Activity Code
1 380001333	38-252180600	HARRISON TERMINAL, I...	Active	2



NOTE: The bond information is provided by the eBond application.





- a. Select the **Bond #** hyperlink.

The bond details and subtabs of additional information display.

Details

▼ Bond Information

Bond #
380001333

Principal Number
38-252180600

Bond Status
Active

Principal Name
HARRIDON TERMINAL, INC.

Execution Date
2000-03-13

Effective Date
2000-03-01

Termination Date

Activity Code
2 - CUSTODIAN OF BONDED MERCHANDISE

Amount \$
200000.00

Sufficiency Status
Sufficient

Insufficiency Date

Principal / User Surety Rider Sufficiency In-Bond Authorization

Principal / User
1 Records

Importer #	Importer Name	Type	Start Date	End Date
38-252180600	HARRIDON TERMINAL, INC.	Principal	3/1/2000	

- b. Select a subtab to display additional information.

- c. Select the **< Back** button to return to the carrier account information.

Home Accounts ▼ Account Search References

< Back

Account Navigation

Details

▼ Bond Information

16. Select the **CSPOA's** tab to view the power of attorneys list.

Account Name
CBP ASD Surety

Record Type Name ACE ID Surety Code Status
Surety 1004293148 CBP EIN Pending

Details Contacts Addresses Bonds **CSPOA's**

Related CSPOAs
2 Records

	CSPOA Name	Agent Id	Status	Surety Code
1	ROCK89	167-89-8837	Active	096
2	WATHEN, DIANE	223-66-4554	Active	096

17. Select the **CSPOA Name** hyperlink to display the power of attorney information.







18. If applicable, select the **Edit** icon .

Details Addresses

▼ CSPOA Information

CSPOA Name	WATHEN, DIANE	
Date Received	4/1/1989	
Status	Active	

a. In the edit pane, update the appropriate fields.



Details Addresses

▼ CSPOA Information

* CSPOA Name	WATHEN, DIANE	Agent Id	223-66-4554
Date Received	4/1/1989	Date Effective	4/1/1989
Status	Active	* Port	0501

▼ District Limits

<input checked="" type="checkbox"/> National Declaration		* National District Limit	\$50,000,000.00
National District	99		



NOTE: Grayed out fields are not editable.

b. Select the **Save** button.

In a **Facility Operator** account, for users with permissions to view their facilities, FTZ subzone sites, and FTZ GP sites (steps 19-21):

19. Select the **Facilities** tab to view the list of facilities.

Account Name
Eagle Operations

Record Type Name: Facility Operator ACE ID: 1004325633 Taxpayer ID: 52-5678123

Details Contacts Addresses **Facilities** FTZ Subzone Sites FTZ GP Sites Change History

Related Facilities
1 Records

	Facility Name	ACE ID	Port	Classification	Bonded
1	Eagle Warehouse	1004327334	2301	Warehouse	Yes

a. Select the **Facility Name** hyperlink to view the facility account information.

b. Select the **< Back** button to return to the facility operator account.





20. Select the **FTZ Subzone Sites** tab to view the list of FTZ subzone sites.

Details	Contacts	Addresses	Facilities	FTZ Subzone Sites	FTZ GP Sites	Change History
Related FTZ Subzone Sites						
2 Records						
	Zone ID #	Site #	Zone Number	FIRMS Code	Port	Status
1	98900F001	001	989	AAK2	1171	Activated
2	98900D009	009	989	AAK4	1101	Activated

- Select the **Zone ID #** hyperlink to view the FTZ subzone site information.
- Select the **< Back** button to return to the facility operator account.

21. Select the **FTZ GP Sites** tab to view the list of FTZ GP sites.

Details

Contacts

Addresses

Facilities

FTZ Subzone Sites

FTZ GP Sites

Change History

Related FTZ GP Sites

4 Records

	Zone ID #	GP Zone Sit...	Site #	Zone Name	FIRMS Code	Port	Status
1	9890010A1	001	0A1	Emily GP Site 5 1...	AAH0	1171	Deactivated
2	9890010A3	001	0A3	Emily GP Site 6.9...	B185	1171	Activated

- Select the **Zone ID #** hyperlink to view the FTZ GP site information.
- Select the **< Back** button to return to the facility operator account.

In an **FTZ Subzone Site** or **FTZ GP Site** account, for users with permissions to view the description and bonds and to upload documents (steps 22-25):

22. In the **Details** tab, expand the **Description** section to view description information.

Account Name Continental Mills 01				
Record Type Name FTZ Subzone Site	ACE ID 1002602511	Zone Id #	Zone #	Subzone Suffix
<div> <div>Details</div> <div>Addresses</div> <div>Documents</div> <div>Change History</div> </div>				
> FTZ Subzone Site Information				
<div> <div>Description</div> <div>Bonds</div> </div>				

23. In the **Details** tab, expand the **Bonds** section to view bonds information.

24. Select the **Documents** tab to view the list of document folders.

Details	Addresses	Documents	Change History
Related Document Folders			
1 Records			
<div> <div>Site Documents</div> <div>Date of Last Update: • On File:</div> </div>			





25. To upload a document to an existing document folder added by the FTZ board or a CBP officer, reference the [Documents](#) topic and the **Add a Document to a Document Folder** step table for details.

In a **Facility** account, for users with permissions to view, edit, and add employees, officials, and document folders and documents (steps 26-29):

26. Select the **Employees** tab and the **Add Facility Employee** button.

The screenshot shows the ACE Portal interface for a Facility account named "Fat Hats Warehouse". The account details include Record Type Name (Facility), ACE ID (0000262914), FIRMS Code (SAA6), Port of Application (2301), and Status (Active). Below the details, there are tabs for Details, Contacts, Addresses, Employees (highlighted), Officials, Documents, and Change History. Under the Employees tab, there is a section titled "Related Facility Employees" with "0 Records". A red box highlights the "Add Facility Employee" button in the top right corner of the Employees section.

- a. In the **Create a new Facility Employee** pane, in the **Employee Information** section, complete the appropriate employee fields.

The screenshot shows the "Create a new Facility Employee" pane, specifically the "Employee Information (step 1 of 3)" section. The section is titled "Employee Information" and contains several input fields for employee details. The fields are arranged in two columns. The left column includes fields for Last Name, First Name, Birth Country (set to United States), Birth City, Phone Number, and Employee History Start Date. The right column includes fields for Middle Name, Date of Birth, Birth State/Province (set to Select an Option), Social Security Number, Phone Ext, and Employee History End Date. At the bottom right of the pane, there are three buttons: "Back", "Cancel", and "Next >".

- b. Select the **Next >** button.





- c. In the **Home Address Information** and **Contact Information** sections, complete the appropriate address and contact fields.

Create a new Facility Employee
Address Information (step 2 of 3)

Employee Information

Home Address Information

* Address Type

Home

* Country

United States

Additional Address Line 1

* City

* Postal Code

C/O

* Street

* PO Box

Additional Address Line 2

* State

Select an Option

County

Contact Information

Phone

Phone Ext

Fax

Fax Ext

Email

Website

https://

< Back

Cancel

Next >

- d. Select the **Next >** button.

The **Validate Address** dialog box displays.

Validate Address

User's Input Address

Street: 1200 Wilson Blvd

City: Arlington

State/Province: VA

Country: US

Postal Code: 20350

Validated Address

Street: 1200 WILSON BLVD

City: ARLINGTON

State/Province: VA

Country: US

Postal Code: 22209-2305

☒ Use Validated Address?

Confirm

- e. Select the **Confirm** button to confirm the validated address.





- f. In the **Create a new Facility Employee Review** pane, review the added information, scrolling down to review all fields.

Create a new Facility Employee
Review (step 3 of 3)

Employee Information

* Last Name: Jacobson

* First Name: Jerry

* Birth Country: United States

* Birth City: Arlington

Phone Number:

Email:

* Employee History Start Date: 7/3/2023

* Home Address Information

* Address Type: Home

Middle Name:

* Date of Birth: 1/1/1991

* Birth State/Province: Virginia

* Social Security Number: 543-50-3322

Phone Ext:

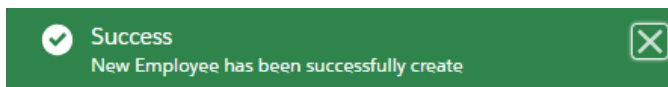
Employee History End Date:

C/O:

[< Back](#)
[Cancel](#)
[Save](#)
[Next >](#)

- g. Select the **Save** button to save the facility employee.

The **Success** message displays.



The new facility employee displays in the **Related Facility Employees** list.

Details

Contacts

Addresses

Employees

Officials

Documents

Change History

Related Facility Employees

1 Records

Add Facility Employee

	Name ↑	Phone	Email
1	Jerry Jacobson		



NOTE: Select the **Name** hyperlink to display the facility employee information and the **Edit** icon to update the facility employee information.

27. Select the **Officials** tab and the **Add Facility Official** button.

Details

Contacts

Addresses

Employees

Officials

Documents

Change History

Related Facility Officials

0 Records

Add Facility Official

Name	Phone	Email
------	-------	-------



- a. In the **Create a new Facility Official** pane, in the **Official Information** section, complete the appropriate official fields.

Create a new Facility Official
Facility Official Information (step 1 of 3)

▼ **Official Information**

* Last Name	Middle Name
<input type="text"/>	<input type="text"/>
* First Name	* Date of Birth
<input type="text"/>	<input type="text"/>
* Birth Country	* Birth State/Province
United States	Select an Option
* Birth City	* Social Security Number
<input type="text"/>	<input type="text"/>
Phone Number	Phone Ext
<input type="text"/>	<input type="text"/>
Email	
<input type="text"/>	
* Employee History Start Date	Employee History End Date
<input type="text"/>	<input type="text"/>

- b. Select the **Next >** button.
- c. In the **Home Address Information** and **Contact Information** sections, complete the appropriate address and contact fields.

Create a new Facility Official
Address Information (step 2 of 3)

▼ **Official Information**

▼ **Home Address Information**

* Address Type	C/O	
Home	<input type="text"/>	
* Country	* Street	* PO Box
United States	<input type="text"/>	<input type="text"/>
Additional Address Line 1	Additional Address Line 2	
<input type="text"/>	<input type="text"/>	
* City	* State	
<input type="text"/>	Select an Option	
* Postal Code	County	
<input type="text"/>	<input type="text"/>	

▼ **Contact Information**

Phone	Phone Ext
<input type="text"/>	<input type="text"/>
Fax	Fax Ext
<input type="text"/>	<input type="text"/>
Email	Website
<input type="text"/>	https://

- d. Select the **Next >** button.





The **Validate Address** dialog box displays.

Validate Address

User's Input Address

Street: 100 Main St
City: Alexandria
State/Province: VA
Country: US
Postal Code: 22312

Validated Address

Street: 100 MAIN ST
City: ALEXANDRIA
State/Province: VA
Country: US
Postal Code: 22312

☒ Use Validated Address?

✓ Confirm

- e. Select the **Confirm** button to confirm the validated address.
- f. In the **Create a new Facility Official Review** pane, review the added information, scrolling down to review all fields.

Create a new Facility Official Review (step 3 of 3)

▼ Employee Information

* Last Name

* First Name

* Birth Country

* Birth City

Phone Number

Email

* Employee History Start Date

Middle Name

* Date of Birth

* Birth State/Province

* Social Security Number

Phone Ext

Employee History End Date

▼ Home Address Information

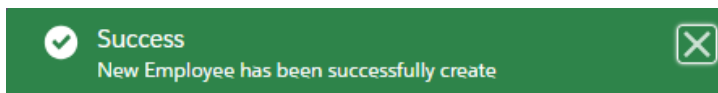
* Address Type

C/O

← Back
✕ Cancel
💾 Save
Next →

- g. Select the **Save** button to save the facility official.

The **Success** message displays.





The new facility official displays in the **Related Facility Officials** list.

Details	Contacts	Addresses	Employees	Officials	Documents	Change History
<div>Related Facility Officials</div> <div>1 Records</div> <div>Add Facility Official</div>						
Name	Phone		Email			
1 Scott Williams						



NOTE: Select the **Name** hyperlink to display the facility official information and the **Edit** icon to update the facility official information.

28. Select the **Documents** tab to view the list of existing document folders.

Account Name

Fat Hats Warehouse

Record Type Name

Facility

ACE ID

0000262914

FIRMS Code

SAA6

Port of Application

2301

Status

Active

Details

Contacts

Addresses

Employees

Officials

Documents

Change History

Related Document Folders

11 Records

Add Document Folder

* Premise Inspection Results

Date of Last Update: • On File:

* Date of Inspection

Date of Last Update: • On File:

29. If applicable, reference the [Documents](#) topic for details to add, edit, and delete custom document folders and upload documents.





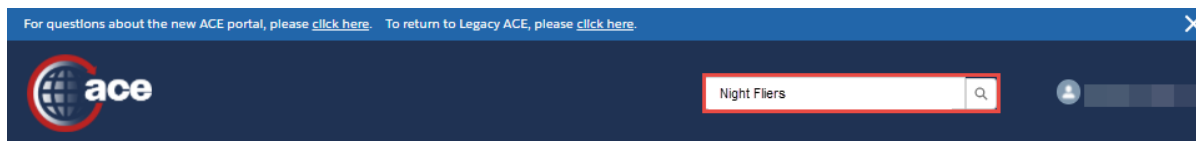
TOPIC 6: ADD AN ADDRESS TO A SUBACCOUNT

INTRODUCTION

Modernized ACE Portal streamlines the add address functionality.

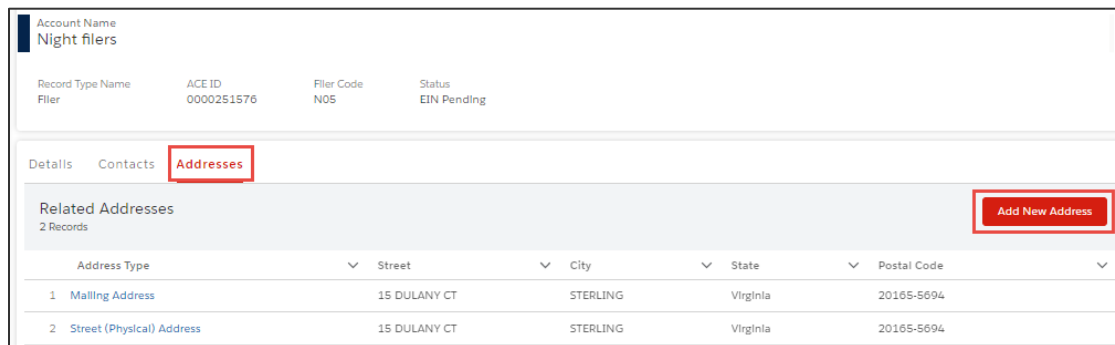
ADD AN ADDRESS TO A SUBACCOUNT

1. Locate a subaccount.



TIP: You can select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If you recently viewed the account, select it in the **Recently Viewed Accounts** list.

2. In the pane that displays:
 - a. Select the **Addresses** tab.
 - b. Select the **Add New Address** button.



TIP: You can update an existing address by selecting the address type hyperlink in the **Address Type** column.

3. In the **Create A New Address** pane, in the **Address Information** section:
 - a. In the ***Address Type** drop-down menu, select the type of address.
 - b. In the ***Street** field, type the *street address*.
 - c. In the ***City** field, type the *city where the address is located*.
 - d. In the ***State** field, type the *state where the address is located*.
 - e. In the ***Postal Code** field, type the *zip code for the address*.
4. In the **Contact Information** section:
 - a. In the **Phone** field, type the *telephone number for the address*.
 - b. In the **Email** field, type the *email address for the location*.



- ### Create A New Address

Address Information (step 1 of 1)

▼ Address Information

* Address Type
Select an Option ▼

* Country
United States ▼

Additional Address Line 1

* City

* Postal Code

C/O

* Street
 * PQ Box

Additional Address Line 2

* State
Select an Option ▼

County

▼ Contact Information

Phone


Fax

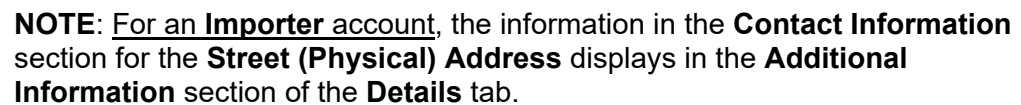
Email

Phone Ext.

Fax Ext.

Website

✕ Cancel
 Submit



- Validate Address

User's Input Address

Validated Address

Street: 1201 S Ross Street
City: Arlington
State/Province: VA
Country: US
Postal Code: 22204

Street: 1201 S ROSS ST
City: ARLINGTON
State/Province: VA
Country: US
Postal Code: 22204-5071

☒ Use Validated Address?

Confirm

+ New Account

Account Name

Flybynite Transport company

Record Type Name

Carrier

ACE ID

0000201106

SCAC

FBNT

Mode of Transport

Ocean

Status

Active

Details

Contacts

Addresses

Bonds

Drivers/Crew

Consignees

Conveyances

Equipment

IR #'s

Shippers

Related Addresses

3 Records

Add New Address

Address Type	Street	City	State	Postal Code
1 Street (Physical) Address	8020 TOWERS CRESCENT DR	VIENNA	Virginia	22182-6224
2 ACS Address	1201 S ROSS ST	ARLINGTON	Virginia	22204
3 Carrier Agent's Address	1201 S ROSS ST	ARLINGTON	Virginia	22204



TOPIC 7: ADD A CONTACT TO AN ACCOUNT OR SUBACCOUNT

INTRODUCTION

To add a contact to an account or subaccount, select the **Add Contact** button and complete the steps. Fields with an asterisk are required.

ADD A CONTACT TO AN ACCOUNT OR SUBACCOUNT

1. Locate a subaccount.



TIP: You can select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If you recently viewed the account, select it in the **Recently Viewed Accounts** list.

2. In the pane that displays:

- a. Select the **Contacts** tab.
 - b. Select the **Add Contact** button.
3. In the **Create a New Contact** pane, in the **Employee Information** section:

- a. In the ***Type** drop-down menu, select the type of contact.
- b. In the ***First Name** field, type the *contact's first name*.
- c. In the ***Last Name** field, type the *contact's last name*.
- d. Complete other fields, as appropriate.





4. In the **Address Information** section:

Create a New Contact
Contact Info (step 1 of 1)

▼ **Address Information**

* Address Type
Contact Relationship Address

* Country
United States

Additional Address Line 1

* City

* Postal Code

C/O

* Street

* PO Box

Additional Address Line 2

* State
Select an Option

County

< Back Cancel Save Next >



NOTE: The ***Address Type** field and address section title may vary depending upon the account type. The ***Address Type** field is prefilled by default and not editable. The ***Country** field may also be prefilled by default and not editable, depending upon the account type.

- Enter either the ***Street** or ***PO Box**:
 - In the ***Street** field, type the *street address*.

OR

 - In the ***PO Box** field, type the *PO box number*.
- In the ***City** field, type the *city*.
- In the ***State** drop-down menu, select the state.
- In the ***Postal Code** field, type the *postal code*.
- Complete other fields, as appropriate.

5. In the **Contact Information** section:

Create a New Contact
Contact Info (step 1 of 1)

▼ **Contact Information**

* Phone

Phone Ext

Fax

Fax Ext

Email

Website

< Back Cancel Save Next >

- In the ***Phone** field, type the *phone number*.
- Complete other fields, as appropriate.
- Select the **Save** button.

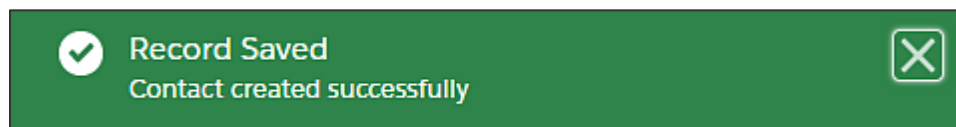




6. In the **Validate Address** dialog box:

A screenshot of the "Validate Address" dialog box. The dialog has a title bar "Validate Address". Inside, there are two columns: "User's Input Address" with an orange location pin icon and "Validated Address" with a green location pin icon. The "User's Input Address" column contains the text: "Street: 123 Nogo Rd NW", "City: Washington", "State/Province: DC", "Country: US", and "Postal Code: 20001". The "Validated Address" column contains the text: "Street: 123 NOGO RD NW", "City: WASHINGTON", "State/Province: DC", "Country: US", and "Postal Code: 20001". Below these columns is a checkbox labeled "Use Validated Address?" which is checked. At the bottom right of the dialog is a red button with a white checkmark and the text "Confirm".

- If necessary, select the **Use Validated Address?** checkbox to use the validated address.
- Select the **Confirm** button.



The **Record Saved** message displays.





TOPIC 8: ADD AND EDIT DOCUMENT FOLDERS AND DOCUMENTS

INTRODUCTION

The Documents feature applies to Facility, FTZ Subzone Site, and FTZ GP Site account types.

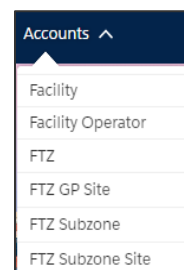
For a **Facility** account, the **Documents** tab displays eleven predefined document folders that correspond to the Document Types in Legacy ACE. You can add custom document folders to organize documents and add documents to both predefined and custom document folders.

You can delete a custom document folder. Doing so also deletes all documents in the custom document folder.

VIEW DOCUMENT FOLDERS

1. In the **Accounts** drop-down menu, select the **Facility**, **FTZ Subzone Site**, or **FTZ GP Site** account type.
2. In the accounts page, in the **Account Name** column, select the account hyperlink.

Facility Accounts		
Showing 50 / 2000 Results		
Account Name	ACE ID	FIRMS Co
5 OHIO DIST WHSE DISTRANS	0000167794	J843
6 PRESTON TRUCKING	0000167795	J844



3. In the **Account Name** pane, select the **Documents** tab.

Account Name				
PRESTON TRUCKING				
Record Type Name	ACE ID	FIRMS Code	Port Code	Status
Facility	0000167795	J844		Active
Details Contacts Addresses Employees Officials Documents				
▼ Facility Information				
Facility Name				ACE ID
PRESTON TRUCKING				0000167

A list of document folders displays.

Details	Contacts	Addresses	Employees	Officials	Documents
Related Document Folders					
11 Records					
* Premise Inspection Results					
Date of Last Update: · On File:					
* Date of Inspection					
Date of Last Update: · On File:					
* Cert of Record Keeping System meeting regulatory inventory and control guideline					
Date of Last Update: · On File:					
* Proof of Fire Insurance					

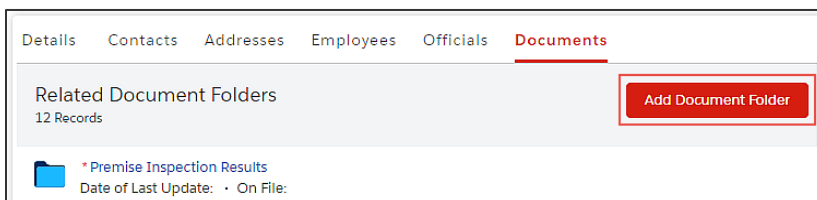


NOTE: The **Records** count at the top indicates the number of document folders.



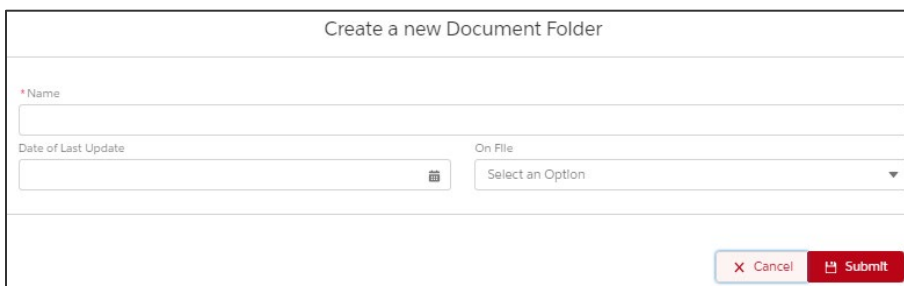
ADD A CUSTOM DOCUMENT FOLDER

1. In the **Documents** tab, select the **Add Document Folder** button.



The screenshot shows the 'Documents' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Related Document Folders' with a sub-header '12 Records'. To the right of this section is a red button labeled 'Add Document Folder'. Below the 'Related Document Folders' section, there is a list item for '*Premise Inspection Results' with a sub-header 'Date of Last Update: - On File:'.

2. In the **Create a new Document Folder** pane:



The screenshot shows the 'Create a new Document Folder' pane. It has a title bar 'Create a new Document Folder'. Below the title bar, there is a form with three fields: '*Name' (a text input field), 'Date of Last Update' (a date picker with a calendar icon), and 'On File' (a drop-down menu with the text 'Select an Option'). At the bottom right of the pane, there are two buttons: 'Cancel' (with a red 'X' icon) and 'Submit' (with a red document icon).

- a. In the ***Name** field, type the *folder name*.
- b. If applicable, in the **Date of Last Update** field, type a *date* or select the calendar icon and select a date.
- c. If applicable, in the **On File** drop-down menu, select an option.
- d. Select the **Submit** button.

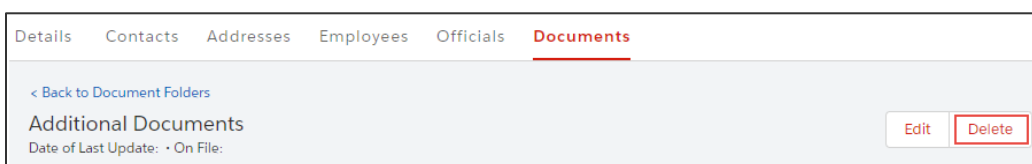
The new custom document folder displays in the **Related Document Folders** list and the **Records** count increases by one.

DELETE A CUSTOM DOCUMENT FOLDER



NOTE: Folders with an asterisk ***** are required and cannot be deleted. You can only delete custom document folders.

1. In the **Documents** tab, in the **Related Document Folders** list, select a custom document folder name hyperlink.
2. Select the **Delete** button.



The screenshot shows the 'Documents' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Additional Documents' with a sub-header 'Date of Last Update: - On File:'. To the right of this section are two buttons: 'Edit' and 'Delete'.



IMPORTANT: All documents in the folder are also deleted.

The **Confirm** dialog box displays.

Confirm

Are you sure you want to delete this Documents Folder?

Cancel
OK

3. Select the **OK** button to delete the document folder.

The document folder is removed from the **Related Document Folders** list.

EDIT A DOCUMENT FOLDER

1. In the **Documents** tab, in the **Related Document Folders** list, select the document folder name hyperlink.

Details Contacts Addresses Employees Officials Documents

Related Document Folders
12 Records

📁

* Premise Inspection Results

Date of Last Update: • On File:

📁

Date of Inspection

Date of Last Update: • On File:

2. Select the **Edit** button.

Details Contacts Addresses Employees Officials Documents

< Back to Document Folders

Date of Inspection

Date of Last Update: • On File:

Edit

3. In the **Document Folder Details** pane:

Document Folder Details

* Name

Date of Inspection

* Date of Last Update

7/12/2023

📅

* On File

Filed on Site

▼

✕ Cancel
📄 Submit



NOTE: The folder name is not editable.

- a. If applicable, in the ***Date of Last Update** field, type a *date* or select the calendar icon and select a date.

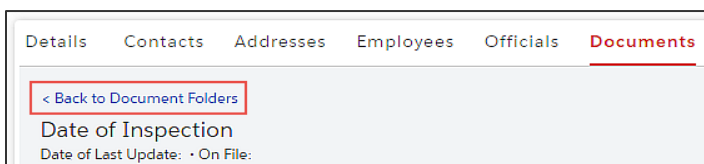
- b. If applicable, in the ***On File** drop-down menu, select an option.



NOTE: The **N/A** and **Not on File** options do not require adding documents.

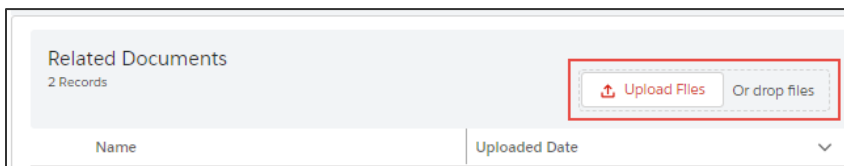
- c. Select the **Submit** button.

4. Select the **Back to Document Folders** hyperlink to return to the **Related Document Folders** list.



ADD A DOCUMENT TO A DOCUMENT FOLDER

1. In the **Documents** tab, in the **Related Document Folders** list, select the document folder name hyperlink.
2. In the **Related Documents** section, select the **Upload Files** button.

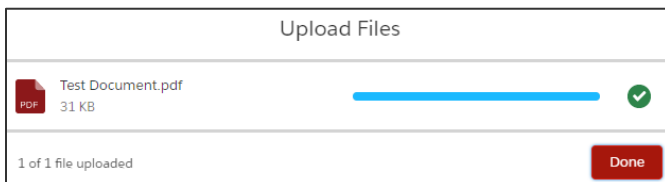


3. In the **Open** dialog box, locate and select the file to upload.
4. Select the **Open** button.



TIP: You can drag and drop the selected file to the **Or drop files** button.

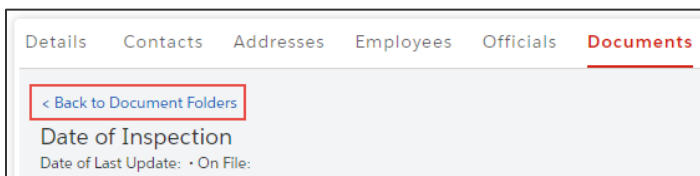
The **Upload Files** dialog box displays the progress of the file upload.



5. Select the **Done** button when the upload is complete.

The uploaded document displays in the **Related Documents** list.

6. Select the **Back to Document Folders** hyperlink to return to the **Related Document Folders** list.





TOPIC 9: SHARE FEEDBACK ON THE MODERNIZED ACE PORTAL

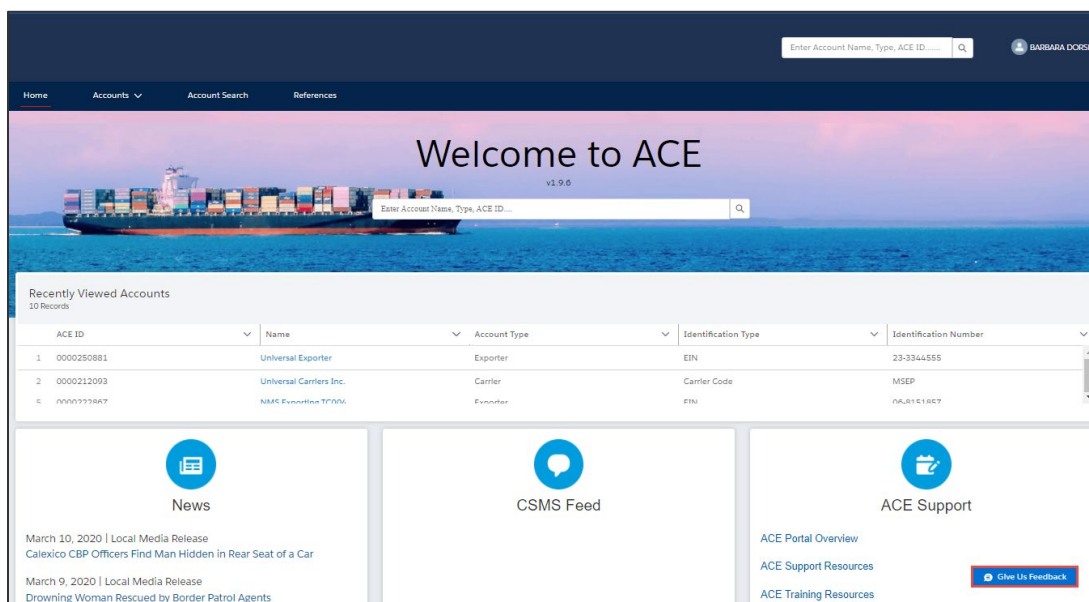
INTRODUCTION

Share feedback on what you like or what can be improved using the Give Us Feedback feature. The feedback is monitored and shared with the stakeholders to determine if the suggestion(s) should be implemented.

The **Give Us Feedback** button displays on each page of the Modernized ACE Portal.

SHARE FEEDBACK ON THE MODERNIZED ACE PORTAL

1. In the Modernized ACE Portal, select the **Give Us Feedback** button.



2. In the **Give Us Feedback** dialog box:
 - a. In the **What do you like?** field, type a *comment*.
 - b. In the **What we can improve?** field, type a *comment*.
 - c. In the **Rate Us!** field, move the slider bar to rate the UI.
 - d. Select the **Submit** button.



NOTE: Select the **Cancel** button to cancel the feedback and close the dialog box.

Select the **Need Support?** hyperlink for general information about CBP.

TOPIC 10: ACCESS SUPPORT FOR MODERNIZED ACE PORTAL ISSUES

INTRODUCTION

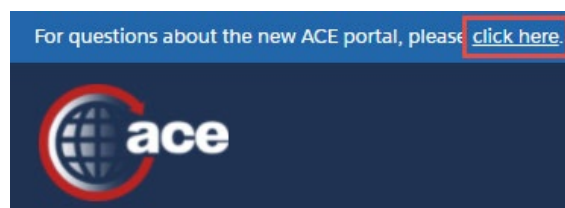
Unlike Feedback, use the Support feature to get help with technical issues.

ACCESS SUPPORT FOR MODERNIZED ACE PORTAL ISSUES

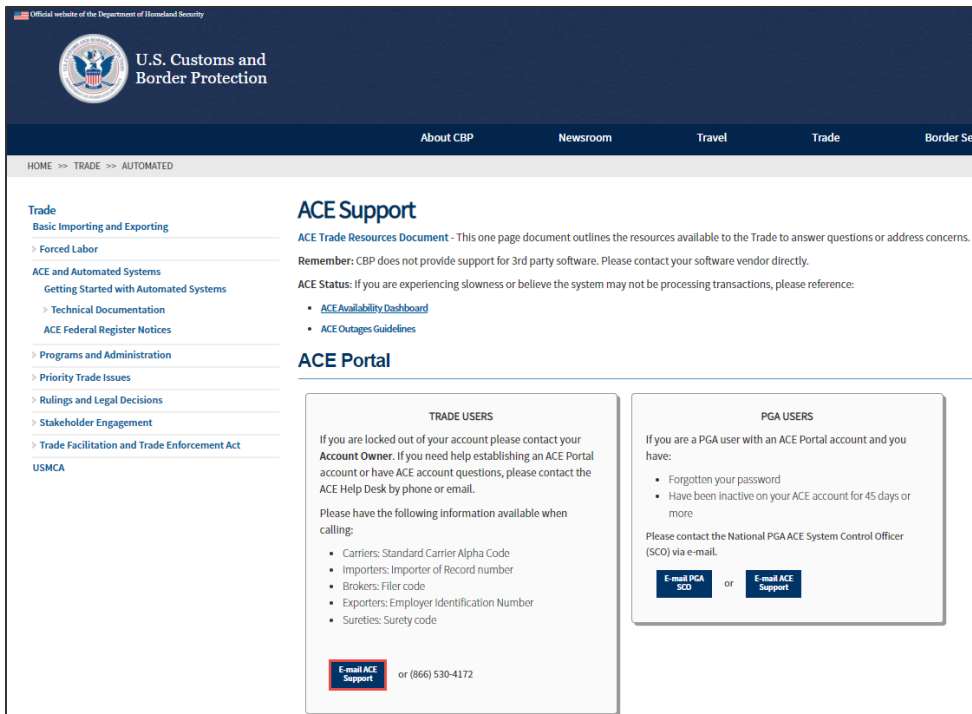
1. In the Modernized ACE Portal home page, select **Support** from the drop-down menu next to your name.



NOTE: You can also access support through the **click here** hyperlink at the top of the home page.



2. In the **ACE Support** home page, in the ACE Portal section, select the **E-mail ACE Support** button.



An email addressed to ACE.Support@cbp.dhs.gov will open in your default email application.

3. In the email body, type the issue you are having with the Modernized ACE Portal.



4. Select the send button.

The email is sent to the CBP Technology Service Desk (TSD)/ACE Service Desk (ASD). An email will be sent back when the issue is resolved and/or seeking additional information acknowledging the receipt of the request.

